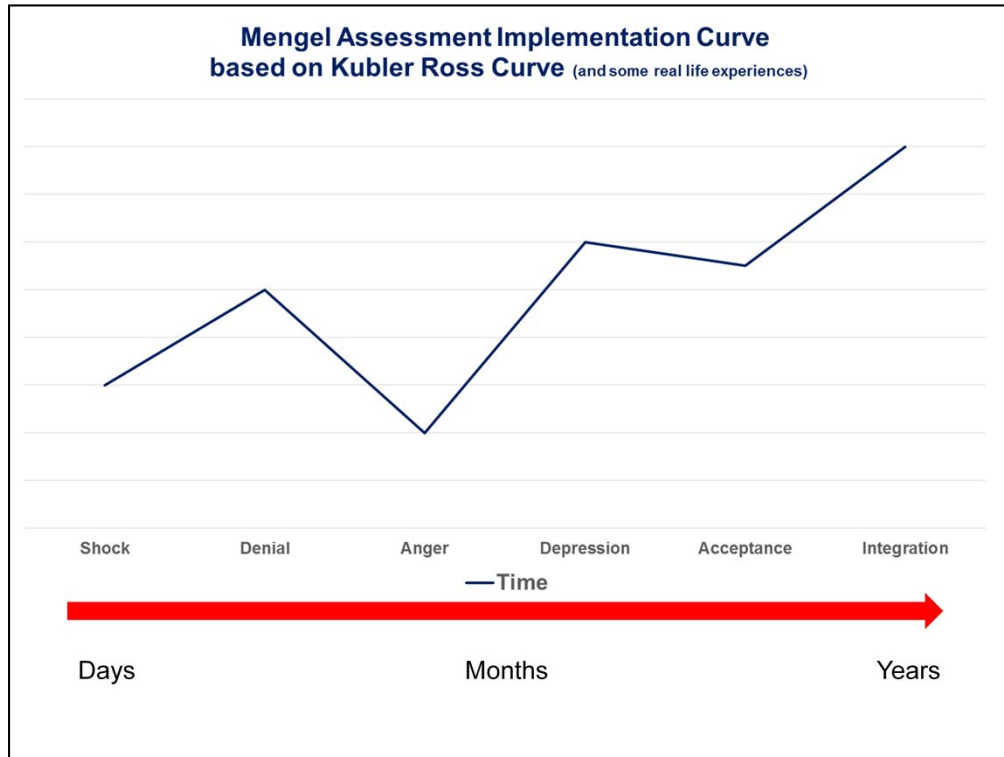**Closing the Loop: Assessment Therapy 101**
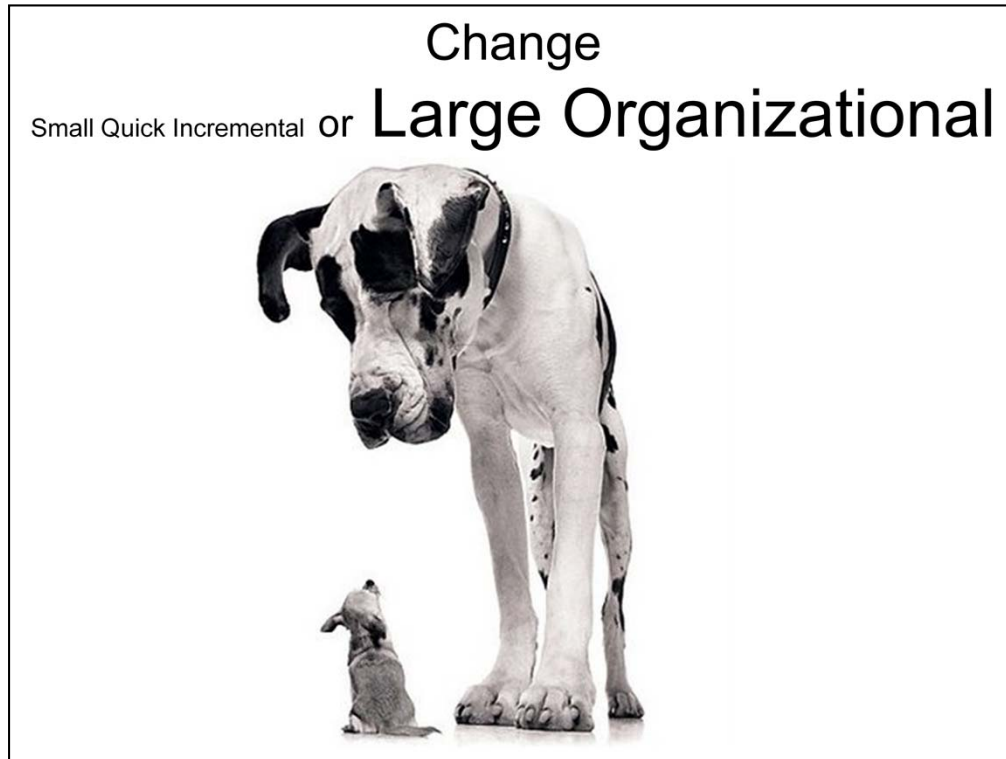
Liz Mengel Johns Hopkins University ALA Mid Winter January 2014

I don't believe I have any more answers than anyone else in this area. I agreed to talk on this today mostly because Carolyn said this should be more of me leading a discussion than me standing here and telling you the same old, "This is how we done it good." We are making the assumption today that everyone here knows how to do assessment. You can figure out how to determine need, gather data, analyze that data, and report out to your organization. So what happens after that? What changes? Are you too tired at that point to make the change happen? What happens if you pass off the findings to another team to implement and nothing happens? Has any of this happened to you?

Before we start let me confess, we don't have a formal assessment program or assessment librarian. We do have a small and blossoming User Experience Group. Assessment in the traditional sense is still dispersed across departments. I became interested in assessment when I started looking across the changes happening in higher ed. and libraries and believed we would need to be more active in proving that libraries are still the heart of the campus.

Mengel Assessment Implementation Curve based on Kubler Ross Curve (and some real life experiences)

Shock · Denial · Anger · Depression · Acceptance · Integration

—Time

Days · Months · Years

So have you run into this story? You do some assessment project. You report out the results either to the organization or to the group of stakeholders. You're shocked that they 1. either don't believe **that** could be the result or 2. that the implementation plan you are suggesting as next steps could be possible or 3. someone stops you in the hall after the meeting and kindly tells you, "you know that will never work here" or "I know that's what the data says, but I just don't believe it." You go home angry and annoyed, open a bottle of wine or box of chocolate or both and sit and fume about all the work you just did. You drag yourself back in to work and start the next thing on your long To Do list and slowly you begin to move toward acceptance. Over time you've integrated the pain into your reality and you move on.

Change

Small Quick Incremental or Large Organizational

I think when we talk about closing the loop you have to look at the type of assessment loop you are trying to close. The approaches you need to take will be different. I think we all do the small incremental changes pretty good and likely more often than we give ourselves credit for. When added together these small changes actually have a large impact, that we probably don't ever see as adding up to something "BIG".

The larger organizational changes are much harder and often take years to see the loop closed or any impact at all.

Small incremental changes for my library would include things such as changing hours for a building or a service or developing new instruction based on evaluations. So let's talk about some small incremental changes in our various organizations.

Small Quick Change

- **Changing Service Hours**
  - Reading Room stats
  - Gate counts
  - Seat counts
  - Building use counts

- **Assessing Reference Questions**
  - Develop data set
  - Code
  - Analyze
  - Implement

What have you done?

For the first example I wanted to change our Special Collections service desk hours. Our hours had been 8:30-5 M-F and until 8 on Thursdays. Looking over our data from our reading room stats we seldom had patrons prior to 10 and seldom on Thursdays. Worked with UX and looked at other data points that we already had. We ended up changing the hours to M-F 10-6 and Tuesdays til 8.

Coding reference:

- 5 years of READ scale data (Reference Assessment Effort Data)

Coded – discovered 40% of the questions were not high level enough to go to a librarian in the reference office.

Change training and FAQs for information desk students and develop LibAnswers

In your groups spend 3-4 minutes discussing small quick change assessments you've done in your organization.

Give yourself credit for doing those.

Rapid Iteration Prototyping

- Generally used in:
  - software development
  - user interface design
  - web development

  "I have not failed, I've just found 10,000 ways that won't work."

  Thomas Edison

- BUT, other uses:
  - Complex interactions
  - New functionality
  - Changes in workflow, tech, or design

- Info Desk changes project

- How could you use this?

Very simply, it is about creating a quick mock up of a future state, validate with users, stakeholders, developers, and designers, It is a great way to help teams experiment with multiple approaches and ideas. Focus on the 20% that effects the 80% o whatever. You create scenarios, use stories, or what ever you need to find the story in the data. Then it is just a process of review, refine, prototype, review, refine, prototype….
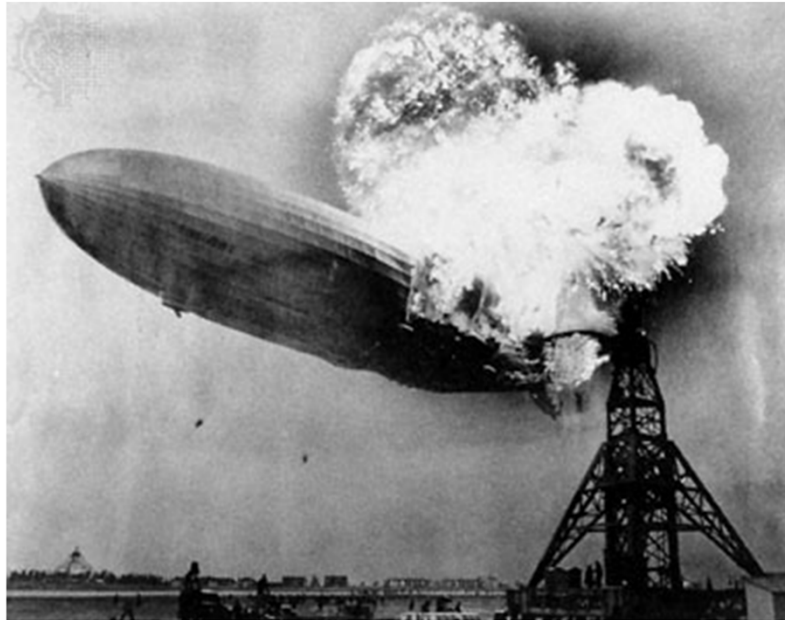
We used this to make some changes in our Info Desk staffing. Based on the study I talked about earlier, there were some changes that needed to be made. Created a year long study (how one "assessment project leads to another…) looking at questions asked and answered by our info desk workers, analyzed the data and made changes in coverage (having two students on from 12-3), how often the students met with our desk manager, changed their training, and updated the Info Desk FAQ. We are continuing to review how this is working and we'll make changes if needed.

Take 3-4 minutes at your table talking about projects you've done where this could have been used.

Large Organizational Change

A very wise person once told me that it takes 7 years to make large, substantial organizational changes. I believe for most academic libraries that is probably still too quick.
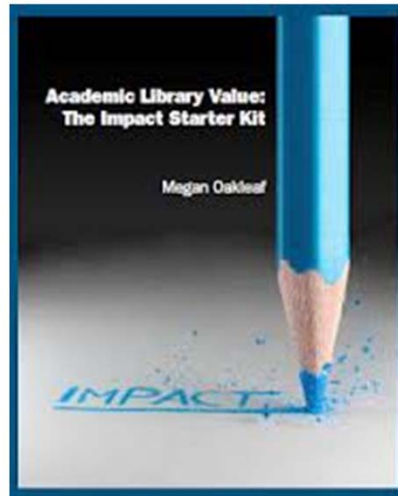
My Crash and Burn Story

I think it is important to talk about our failures. I think they can often teach more than our successes. So here one of mine quickly.

ClimateQual handover to managers council. What I learned have to spell out expectations – clearly, explicitly, with a project plan in place - if you hand something over. Get people invested early and often. Follow up, follow up, follow up. Be fine with being a nag.

Anyone want to share one of their stories?

Activity #51 – Closing the Loop

- Reflect
- Decide
- Act
- Share

Academic Library Value: The Impact Starter Kit

Megan Oakleaf

IMPACT

I am plugging Megan here because I think the kit she did has some amazing exercises in it. You have to buy the book to get the exercise, but Megan asks a series of questions around the categories of reflect, decide, act, and share to help you close the loop. Although there is one that I think you need to have answered prior to starting any assessment or research activity –What types of decisions or actions do you want to occur as a consequence of these activities? If you were a scientist the question would be, what is your hypothesis?

Questions for consideration

- How have you defined your assessment program – what is its core objective?
- Who does the work? Who has already drunk the Kool Aid?
- How tied into your Systems/IT department is your assessment program?
- How are you using your students to work in assessment?
  - Do you allow them to question your assumptions?

Some additional questions for consideration

And a few more

- Do you know how long your data lasts?
- How are you challenging your organizations' mental models? Your own?
- How do you scope the work for others to be able to take this work forward?
- How do you pull together different sets of data to re-evaluate its use?
- How often do you ask, "Are these viable solutions to this problem?"
- How well have you defined the problem? Is it a real problem?

EVER TRIED.
EVER FAILED.
NO MATTER.
TRY AGAIN.
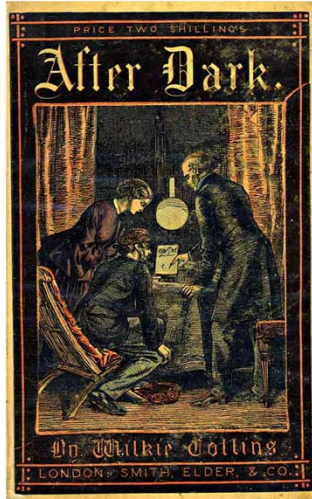**FAIL AGAIN.**
FAIL BETTER.

Samuel Beckett (1906-1989)

I am sharing two quotes that I really like, that I keep posted in my office to remind me that failing is sometimes a good thing – especially if you learn from it. I love the idea of failing better.

I'VE MISSED MORE THAN 9,000 SHOTS IN MY CAREER. I'VE LOST MORE THAN 300 GAMES. I'VE BEEN TRUSTED TO TAKE THE GAME WINNING SHOT AND MISSED. I'VE FAILED OVER AND OVER AND OVER AGAIN IN MY LIFE. AND THAT IS WHY I SUCCEED.

Michael Jordan

One Thing We're Working On Now

The Library After Dark

- Use the BLC as the petri dish
- What happens after 8:30 pm?
- How does furniture move around and why?
- How can we use this to renovate the older space?

Finally, here's one of the things our User Experience group is working on now. They are just in the process of setting up the research they need to start to figure out what happens in the library after dark. We will use this information to help formulate ideas on how to renovate the older part of the library.